



# **Case Study**

## **Zoho CRM Solution: Empowering Client Success**

## **Client Overview:**

Our client, a dynamic and rapidly growing organization, a leading manufacturer of refined rice bran oil and other rice-based products. With a strong commitment to sustainable manufacturing practices and environmental responsibility, they have gained trust on a significant scale. Their mission revolves around promoting a healthier lifestyle by offering heart-healthy food products. Recognizing the significance of automation in today's business landscape, the client sought a trusted IT partner to digitize their manual processes and streamline their operations.

#### **Problem Statement:**

Being a substantial player in the industry, our client manages a diverse array of customers and vendors. To effectively handle data, inventory, sales, and other warehousing processes, they required a centralized ERP system. They encountered the following challenges:

- Delay in the purchase of raw materials and inventory management.
- Issues with proper report generation.
- Confusion in selecting the right vendor.
- Bulk order sales and management.
- Complexity in warehouse and store management.
- The need for a centralized ERP system.

## **Solution Provided:**

Codinix Technologies stepped in as the trusted IT partner for the client, promptly addressing these challenges. Our Zoho Integration team of highly qualified developers embarked on automating various processes to streamline the client's operations into a single, cohesive platform.

## We offered the following solutions with our Zoho Implementation Services:

## 1. Purchase Module:

- Developed a purchase module to generate filtered purchase reports, simplifying the procurement process.
- Implemented a process for material return/replacement and inventory updates.
- Enabled easy vendor comparison based on raw material prices through a user-friendly form.
- Facilitated customized email communication of purchase orders to vendors and customers via templates with in-built customization.

## 2. Sales Module:

- Created a centralized sales module to automate post-production processes.
- Developed a detailed dispatch plan for bulk orders upon generating sales orders.

- Added features to update inventory in case of order cancellations or returns.
- Provided visibility into dispatched and pending quantities with status updates.

#### 3. Store Module:

- Introduced a store module to maintain up-to-date inventory.
- Implemented notifications for replenishing raw materials when stock levels reach a certain limit.
- Offered material receipts with updated numbers of replaced and returned materials.
- Streamlined quality checks with an automatically generated checklist.
- Integrated an item issue feature for requesting required items with tracking capabilities.

### 4. Warehouse Module:

- · Simplified data storage and management for goods unloading, loading, entry, and exit details in the warehouse module.
- · Linked goods unloading details to the purchase module and goods loading details to the sales module for efficient tracking.

### **Benefits to Client:**

Our ERP solution has delivered significant benefits, drove our client's growth and enhancing their operations:

- Established a centralized data storage system for various manufacturing stages and business processes.
- Streamlined customer and vendor management with well-defined modules.
- Provided filtered and detailed sales reports for better analysis.
- Improved vendor and customer interactions, ultimately boosting ROI.

The Zoho CRM solution implemented by Codinix Technologies has not only transformed our client's operations but has also set them on a path to sustained success in their industry.

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